



**University Advancement
March 12, 2021
Update**

Items of significance that have occurred since the November 13th Foundation Board Meeting:

- Hosted the Anderson College of Nursing and Health Professions Ribbon Cutting on January 11, 2021
- The Development Services team sent out year-end gift receipts.
- Developed and implemented a “model practices” Annual Giving calendar to include 5 giving campaigns including a direct mail piece, giving day and follow up e-mail around each initiative.
- Collaborating across campus for the UNA Giving Day on March 9th.
- To date, we have completed 2/5 Annual Giving Initiatives:
 - Lions**
\$11,608.30 Raised
88 Gifts
 - 1830 (Unrestricted)**
\$46,879.40 Raised
262 Gifts
- Hosted the Jeff Eubanks Culinary Arts Management Program Naming Ceremony on February 5, 2021
- The Legacy Initiative: Rebuilding the Heart of UNA, update:
 - All 7 benches have been named
 - All 6 trees have been named
 - 7 of the 10 marble plaques have been named **+2 since December meeting**
 - 26 of the 56 bronze plaques have been named **+1 since December meeting**
 - As of 2/22/2021, 428 bricks have been named **+165 since December meeting**
- Implemented a new planned giving platform, FreeWill, which is more donor-centric, allows us to be more strategic, and saved about \$3,000 annually and we have already received at \$75,000 gift.
- Developed and implemented the Building Relationships Initiative, an on-going initiative that strategically engages 2020 first time donors, and donors who have given a gift in the past 3 years.
- Sent out performance summaries for all endowed funds and current-use scholarships.
- The UNA Foundation has achieved “Gold” status with GuideStar.
- Hosted the Cole Honors College naming ceremony on Thursday, March 11, 2021.
- Notable upcoming events:
 - Homecoming will be Thursday, March 11th – Sunday, March 13th.
 - Light the Fountain will be on March 30, 2021.
 - The Elaine Augustine Art Gallery naming ceremony will be on Thursday, April 8, 2021.

FY21 Development Goals**Percent of Year Elapsed:****42%**

10/1/2020

	Goal	\$ Raised This FY to date	As of	% of Goal Reached
Total Dollars:	\$ 5,210,301.00	\$4,558,761.62	3/4/2021	87%
Annual Giving:	\$ 600,000.00	\$478,867.01	3/4/2021	80%

	Goal	Number This FY to date	As of	% of Goal Reached
Unique Donors:	2152	1193	3/4/2021	55%

Included in Above Totals

1830 Fund:	\$ 150,000.00	\$58,206.90	3/4/2021
Athletics Unrestricted:	\$ -	\$47,662.63	3/4/2021
	New Planned Gifts	Amount Committed	
Planned Giving:	2	\$125,150.00	3/4/2021



Preparing For The Next Campaign
March 12, 2021
Update

Where We Are:

- President Kitts' invitation letter, inviting donors to participate in the Readiness Study, has been finalized.
- We have identified the 47 donors to be included in the Readiness Study.
- University Communications and Marketing is working on the Case Statements.
 - Once they are finalized, invitations to participate in the Readiness Study will be sent out.

Next Steps:

- Jason McNeal, our Gonser Gerber consultant, will complete the study.
 - The goal is to have all of the interviews complete by June.
- Jason will prepare a report on his findings to President Kitts and Provost Alexander.
- A formal report, a suggested campaign dollar amount, and proposed campaign priorities will be presented to the Board of Trustees at the September Board Meeting.
- Once approved, we are officially in the "Quiet Phase" of the campaign.

As We Prepare:

- Education of the UNA Foundation Board and the Board of Trustees.
 - The UNA Foundation Board and the Board of Trustees are critically important to the success of the campaign.
 - We will begin the education process with a survey which will be sent to all members of the UNA Foundation Board in the coming weeks.
 - The education component will be an on-going process throughout the campaign.
- Priority Items:
 - Get our database cleaned. (ASAP)
 - Send out a survey to all constituents in our database and update the records accordingly. (June/July)



Alumni Relations

- UNA Spring Homecoming Weekend will be March 11-14, 2021. Due to COVID concerns, everyone will be asked to follow safety protocols outlined in the COVID Recovery Taskforce plan to ensure the safety of faculty, staff, students, and alumni in attendance. More information about the schedule of events that will take place during Homecoming can be found at <https://www.una.edu/alumni/homecoming/index.html>.
- The UNA National Alumni Association and Office of Alumni Relations will honor and recognize the 2020 Homecoming Alumni Award honorees at the Homecoming Alumni Awards ceremony on Friday, March 12, 2021, 6:30 p.m. at Norton Auditorium. Special entertainment provided by Dr. Lloyd Jones III and the UNA Jazz Band.
 - Lifetime Achievement – Dr. Robert L. Potts
 - Alumni of the Year – Tyrone “Ty” Jerrell Dennis ‘02
 - Friend of the University – UNA Officer Gregory M. Kirby and K9 Toby
 - Faculty/Staff Alumni Service – LeRoy “Lee” Franklin Brownell ‘90
 - Military Service – Lt. Col. (Retired) Joerle “JB” Blaine Blackman ‘84
 - Educator of the Year – Ana Carolina “Carol” Behel ‘93
 - Public Service – Casey Jerome Eggleston ‘97
 - Community Service – Sonja Redonna Croone ‘98
 - Young Alumni – Indigo Jade Shanice Fort ‘15
- The Huntsville & Madison County Alumni Club has been recognized by the Office of Alumni Relations and UNA National Alumni Association as the 2020 Alumni Club of the Year based on club performance, alumni engagement, campus involvement, and financial contributions to the University of North Alabama.
- In 2020, the Huntsville/Madison County Alumni Club hosted events, fundraisers, and panels that helped bring alumni together during a difficult year. They began the year by facilitating a t-shirt fundraiser that raised hundreds of dollars for the Harley T. and Ruth Kirby Huntsville/Madison Alumni Club Endowed Scholarship. The club started a mentorship program that connected over 20 Huntsville/Madison County alumni volunteers to current students. The Huntsville/Madison County Alumni Club hosted virtual trivia and virtual bingo to help keep people connected during isolating times. They closed out the year with a virtual panel on the Importance of Inclusion in the Workplace and a week of giving raffle to support the endowed scholarship. Despite numerous challenges in 2020, the Huntsville/Madison County Alumni Club grew by over 200 members, connected over 100 alumni at virtual events, and raised over \$1,500 for the endowed scholarship.
- The Office of Alumni Relations has partnered with the UNA Career Center to host a variety of Virtual Speed Networking events during the month of March for the purpose of building relationships between students and alumni. The virtual Speed Networking events will be co-hosted by the Greater Birmingham Alumni Club on March 9 and Huntsville/Madison County Alumni Club on March 10.
- The Office of Alumni Relations has partnered with the Mitchell-West Center for Social Inclusion to help promote the First-Gen Mentorship program. The Mitchell-West Center for Social Inclusion is launching a First-Generation Mentor Program to connect new UNA first-generation students with faculty, staff, and alumni. The primary aim of the program is to provide first-generation college students with the knowledge, confidence, and tools to grow their network, achieve academic excellence, and advance in their career endeavors. The program includes mentorship, access to an affinity group and workshops, staff support, and connection with a larger first-generation network at UNA. The First-Gen Mentor program will officially launch during the month of March.
- The Office of Alumni Relations continues to be more global and digitalized while creating new opportunities for alumni who live remotely to be involved with campus partners through social media, virtual discussions, and interactive meetings with faculty, staff, and students even though access to the campus is limited because of COVID safety protocols and social distancing.



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Development

- Sent performance summaries for all endowed funds and current use scholarships
- Development team implemented an ongoing Building Relationship Initiative which includes sending handwritten notes to first time donors in 2020 and donors who have given a gift within the previous 3 fiscal years within designated regions
- Developed a more sophisticated Annual Giving calendar to include 5 giving campaigns including a direct mail piece, giving day and follow up e-mail around each initiative
- Implemented a new planned giving platform, FreeWill, which is more donor centric
- Implemented IMPACT1830 to encourage all alumni and friends to support the 1830 Fund at UNA
- Hosted the Anderson College of Nursing and Health Professions Ribbon Cutting on January 11, 2021
- Hosted the Jeff Eubanks Culinary Arts Management Program Naming Ceremony on February 5, 2021
- Completed 2/5 Annual Giving Initiatives
 - Lions
 - \$11,608.30 Raised
 - 85 Donors
 - 88 Gifts
 - 1830 (Unrestricted)
 - \$46,879.40 Raised
 - 210 Donors
 - 262 Gifts
- Dollars Raised as of 03/4/2021 42% of Fiscal Year Elapsed
 - Total Dollars Raised: \$4,558,761.62 87% of Goal
 - Annual Giving
 - \$478,867.01 80 % of Goal
 - Athletics
 - \$47,662.63
 - Planned Giving
 - \$125,150.00
 - Number of Unique Donors
 - 1193 55% of Goal



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Financial Services

- An audit of the University of North Alabama Foundation's financial statements for the fiscal year ending September 30, 2020 has been completed by CDPA, PC. The auditors stated that

“In our opinion, the financial statements present fairly, in all material respects, the financial position of the University of North Alabama Foundation as of September 30, 2020, and the changes in its net assets and its cash flows for the year ended in accordance with accounting principles generally accepted in the United States of America.”

The auditors will also complete IRS Form 990 for the Foundation

- In addition to our audit, we have been working toward endowment and current use scholarship awards for Fall 2021 and Spring 2022. This is the most exciting and rewarding time period for our office. Calculating what funds are available for scholarships, Eminent Chairs, Professorships and many other programs is an honor. We are eternally grateful for the many donors who have sacrificed to support UNA. Returns on our endowment portfolio were excellent through December 2021 when we calculate the awards and we were able to increase our awards from last year.



Marketing and Communications

The Office of University Communications and Marketing, or UCM, has been hard at work on several initiatives that have furthered the expansion of the University of North Alabama brand as well as enhanced enrollment and admissions efforts. Additionally, we continue to engage across all audiences as part of our presence in the Office of Advancement.

Since our last meeting, UCM has:

- Launched a new social media platform – TikTok – and experienced growth among the followers on our other social media accounts.
- Developed and implemented a new hold message, which will be updated regularly.
- Implements new livestream requirements for users across campus.
- Developed videos for Founders' Day as well as the upcoming Year of the UNA Woman, which will air for the first time at the Alumni Awards event March 12.
- Successfully completed updated UNA logos to reflect the Year of the UNA Woman, which replaces Una for Leo in the arch and will launch across campus in June.
- Designed graphics for the storefront as well as the interior of UNA on 6th in downtown Tuscumbia.
- Onboarded a new employee – Andrew Phillips – for his role as web developer for enrollment management.
- Created and successfully launched webpages for the Divisions of Diversity, Equity, and Inclusion.
- Developed updates for the Department of Communications as well as merged content and information for the departments of Psychology and Sociology.
- Managed news and updates related to recent weather events that caused a shift in normal campus operations.
- Designed, edited, and published another issue of *The UNA Magazine*, which focused on the passing of our beloved lioness, Una.
- Established landing pages related to the Year of the UNA Woman, securing domains and working toward an online store, an events calendar, and campus signage.
- Launched marketing campaign with Pandora radio, which resulted in successful conversions and related interest and enrollment in UNA.
- Scheduled on-camera and/or Zoom interviews with a number of departments for media coverage throughout the state and region.